#### DO NOT PLACE PHONE ON HOLD!!!!





- ☑ Mute (best option)
- ☑ Leave off hook



# PA Webina - Revised Agenda



- Perm FT to Perm PT (or vice versa)
- Temporary or Intermittent > Accepted Permanent Position
- Reinstate FT employee from LOA to PT
- Workflow Report



#### **Choose the Appropriate Action**



#### When these conditions apply:

- a permanent employee is moving from FT to PT (or vice versa)
- a temporary or intermittent employee accepts a FT permanent position

#### The appropriate Action is determined by the position:

- If position number does <u>not</u> change:
  - the Action is Appointment Change
- If position number <u>does</u> change
  - the Action is either Transfer or Promotion

# Remember! An Action is required—do not adjust individual infotypes

#### **Use the Job Aid to Determine Reason**



#### **PA Actions-Definitions-Reasons**

Action	Reason and Definition	Employmen Status	
Appointment Change - the change in employee's	Trainee to Permanent – employee has completed his/her trainee progression	Active	
type of appointment. Such as permanent, probation time-limited, time-limited probationary, trainee, etc.  Note: Employee isn't changing position numbers.	<ul> <li>Supplemental to Probation – employee is changing from Temporary status to a Probationary status, within the same position, but the employee must serve a probationary period.</li> <li>Supplemental to Permanent – employee is changing from a Temporary status to a Permanent status, within the same position, in which the employment in the Temporary position satisfies the probation period and credentials have been verified.</li> </ul>		
	<ul> <li>Probation to Permanent – employee has completed the probationary period.</li> <li>Probation/Time-Limited to Time-Limited – employee has completed the probationary time-limited period.</li> <li>Time-Limited to Permanent – employee has exceeded 36 months of employment or position is being made permanent.</li> </ul>		
	<ul> <li>Part-Time to Full-Time – employee hours will be 40.</li> <li>Full-Time to Part-Time – employee hours will be less than 40.</li> </ul>		
Choose	Change in Hours – Part-time hours changing.     Extension of Appointment (no money involved).		
the	Intermittent to Probation – employee status that requires a probationary period.		
	<ul> <li>Permanent to Time-Limited – employee status that is time-limited.</li> </ul>	T	
applicable	Permanent to Supplemental – employee status that is Temporary		
reason	Permanent to Intermittent – employee status that is Intermittent.		
. 5 5 5 5 7	Change in FLSA		
	<ul> <li>Trainee to Probation – employee has completed trainee progression but hasn't completed the probationary period.</li> </ul>		
	<ul> <li>Probation to Trainee – employee has accepted a position with a training progression.</li> </ul>		
	Permanent to Trainee – employee has accepted a position with a training		
These are new	Supplemental to Trainee – employee is changing from Temporary status to a Trainee status.		
	<ul> <li>Supplemental to time-Limited – employee is changing from Temporary status to a Time-Limited status.</li> </ul>		
	Supplemental to Probation TL – employee is changing from Temporary status to Probation time-Limited status.		

## **Use the Job Aid to Determine Reason (cont.)**



#### **PA Actions-Definitions-Reasons**

Action	Reason and Definition			
Transfer - the movement of an employee from one graded position to another or from one banded position to another within the present agency or between BEACPN agencies without a break in service.	<ul> <li>Agency to Agency Lateral - movement to a position assigned the same salary grade or movement between positions from one career-banded class to another with the same journey market rate or movement to a position within the same banded class with the same competency level.</li> </ul>	Active		
	<ul> <li>Agency to Agency Re-assignment - movement to a position assigned a lower salary grade or movement between positions from one career-banded class to another with a lower journey market rate or movement to a position within the same banded class with a lower competency level.</li> </ul>			
	<ul> <li>Agency to Agency Promotion - movement to a position assigned a higher salary grade or movement between positions from one career-banded class to another with a higher journey market rate. or movement to a position within the same banded class with a higher competency level.</li> </ul>			
	<ul> <li>Within Agency Lateral - is a change in status resulting from assignment to a position assigned a same salary grade or movement between positions from one career- banded class to another with the same journey market rate.</li> </ul>	<b>*</b>		
	<ul> <li>Within Agency Re-assignment - is a change in status resulting from assignment to a position assigned a lower salary grade or movement between positions from one career-banded class to another with a lower journey market rate.</li> </ul>			
	<ul> <li>Grade Band Transfer - Employee movement between banded and graded classes.</li> <li>Banded to Graded Classes</li> </ul>			

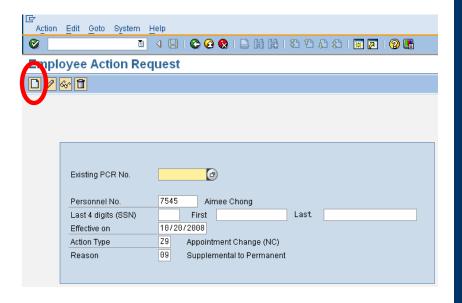
#### **PA Actions-Definitions-Reasons**

Action		Reason and Definition	Employme Status
Promotion - movement to a position assigned a higher salary grade of movement between positions from one career-banded class to another with a higher journey market rate or movement from one position to another	•	Promotion - is movement to a position assigned a higher salary grade or movement between positions from one career-banded class to another with a higher journey market rate or movement from one position to another within the same banded class with a higher competency level.	Active
within the same banded class with a higher competency level.	•	Promotion Inc-After Eff Date – employee receives remainder of increase with a current effective date.	
	•	Acting Promotion - is a temporary movement to a position assigned a higher salary grade or temporary movement between positions from one career-banded class to another with a higher journey market rate or temporary movement from one position other within a same banded class with a higher convetency level.	

#### **Create Workflow**



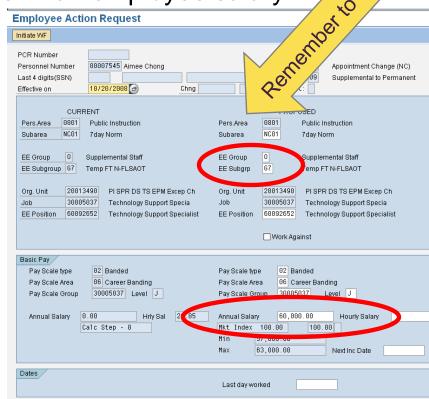
- ZPAA076
  - Personnel No.
  - Effective date
  - Action type: Appointment Change, Transfer or Promotion
  - Reason:
    - Choose as applicable
- Click Create



#### **Create Workflow (cont.)**



- Change Employee Group and Subgroup
- Enter Salary on WF (not IT0008 Basic Pay) salary is the amount the employee will be paid
  - Employee is paid 100% of the salary amount
  - Position may be funded higher than employee salary
- Save
- Use Services for Object to write note to Approver
- Initiate WF



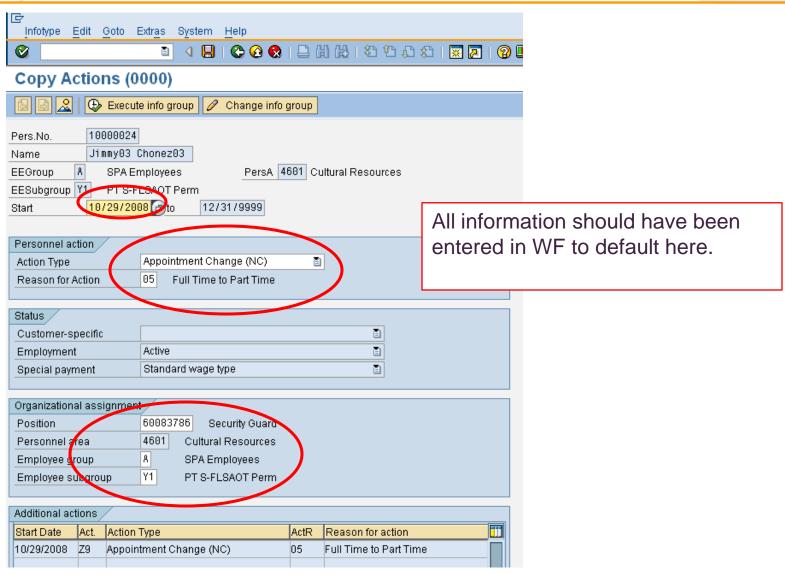
## **Process Approved PCR**



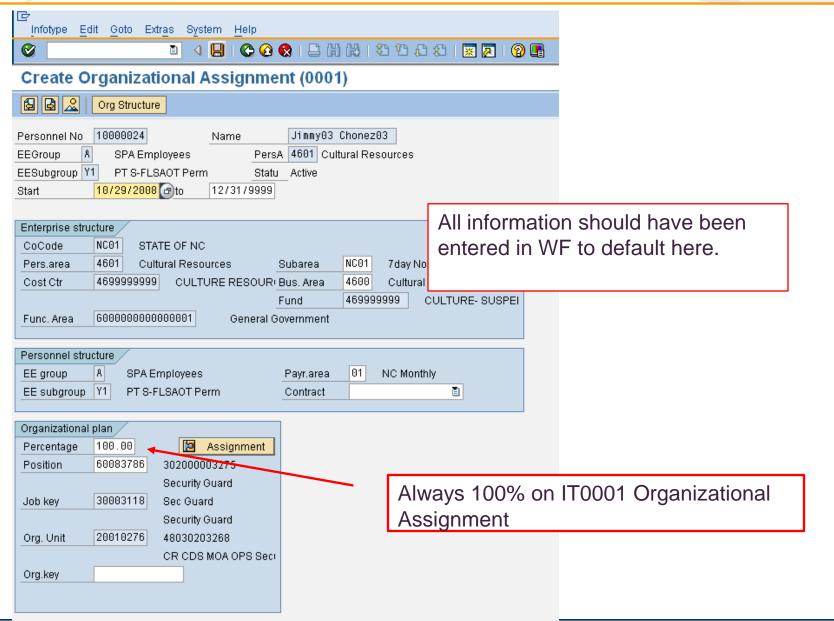
- After PCR is approved and received in Inbox, process as follows:
  - If approved PCR is for **permanent** employee FT to PT (or vice versa), execute PCR and process infotypes (see subsequent slides):
    - 0000 Actions
    - 0001 Organizational Assignment
    - 0007 Planned Working Time
    - Subsequent Activities pop-up
    - 0008 Basic Pay
    - 0019 Monitoring of Tasks
    - 0041 Date Specifications
    - Explicitly complete WF item
  - If approved PCR is for temporary or intermittent employee to permanent position:
    - Contact BEST (unless DOT within DOT)



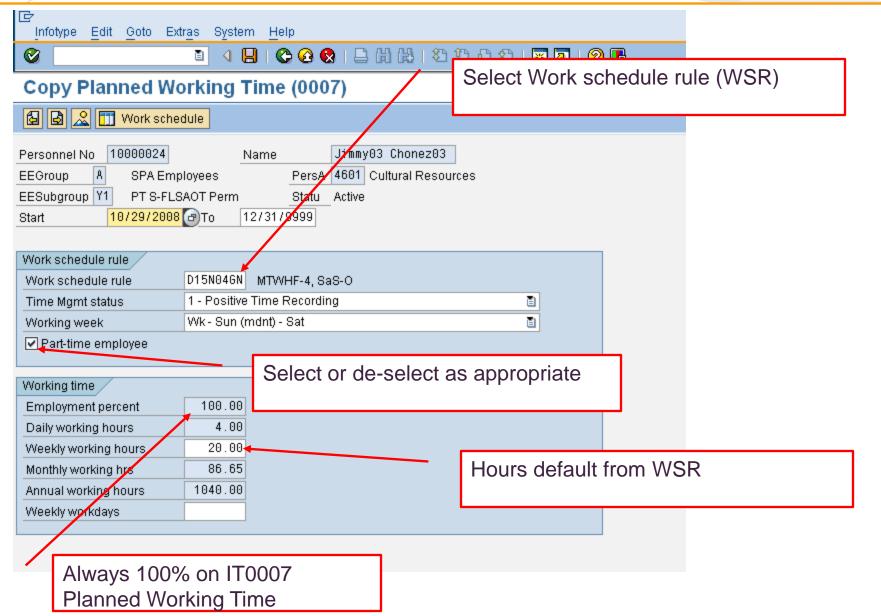






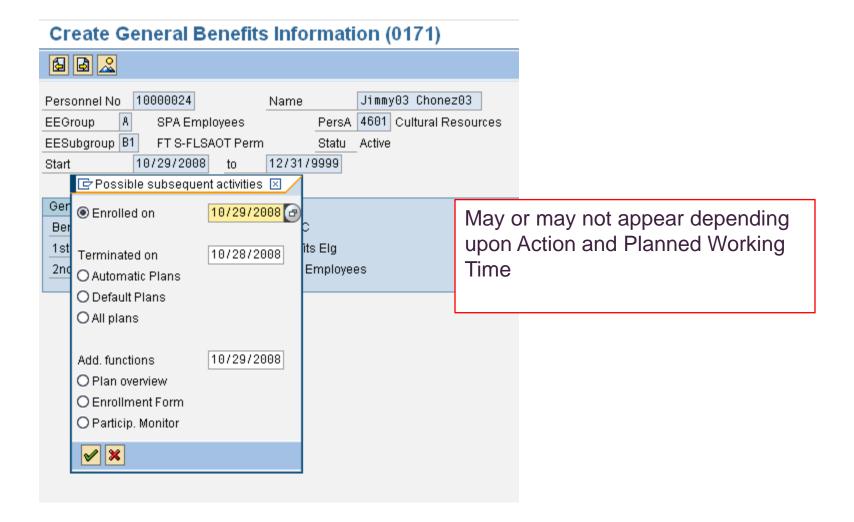




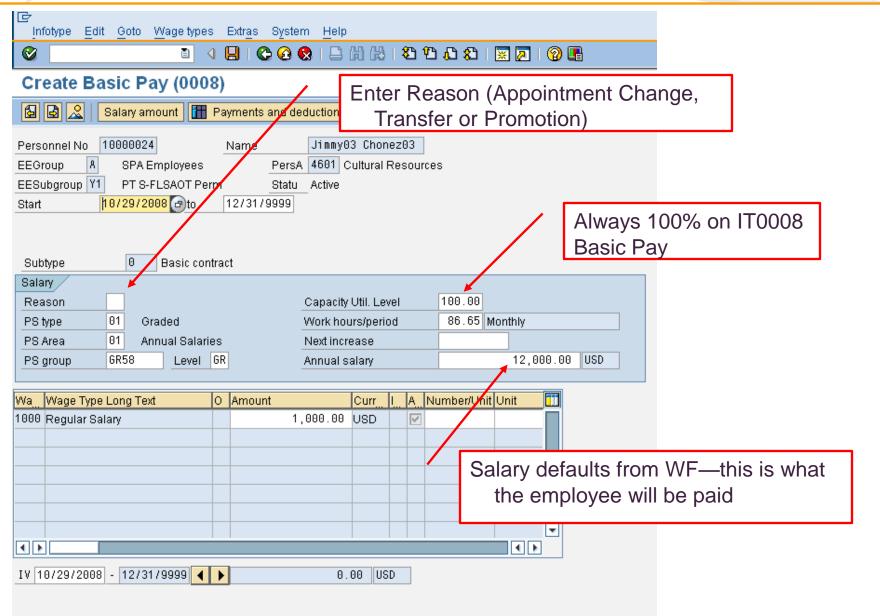


# FT to PT (or vice versa) Subsequent Activities

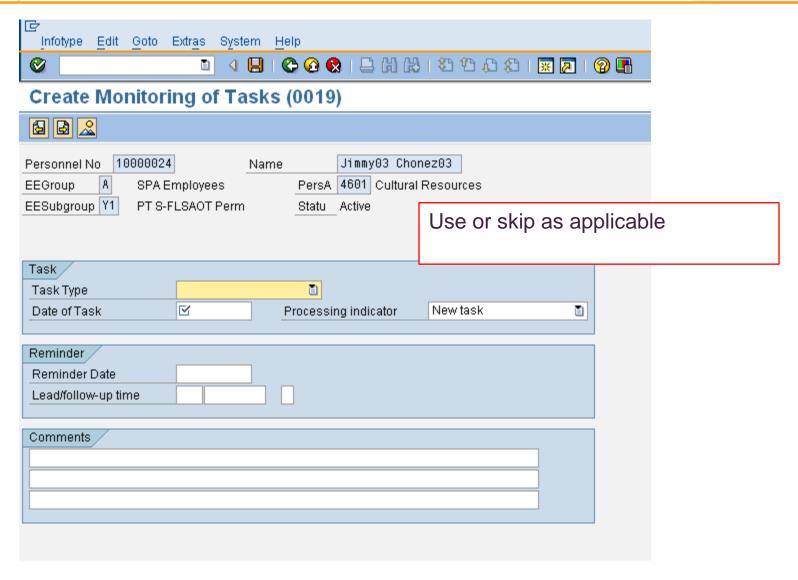




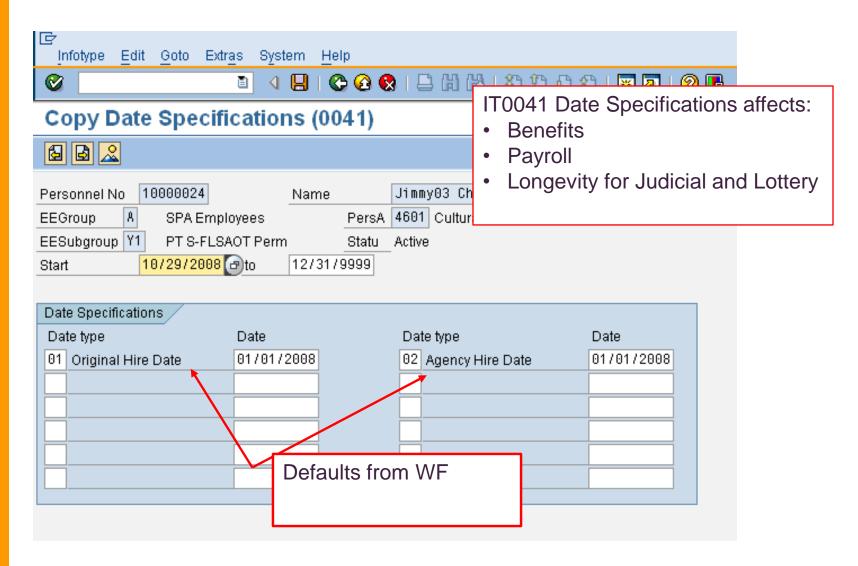






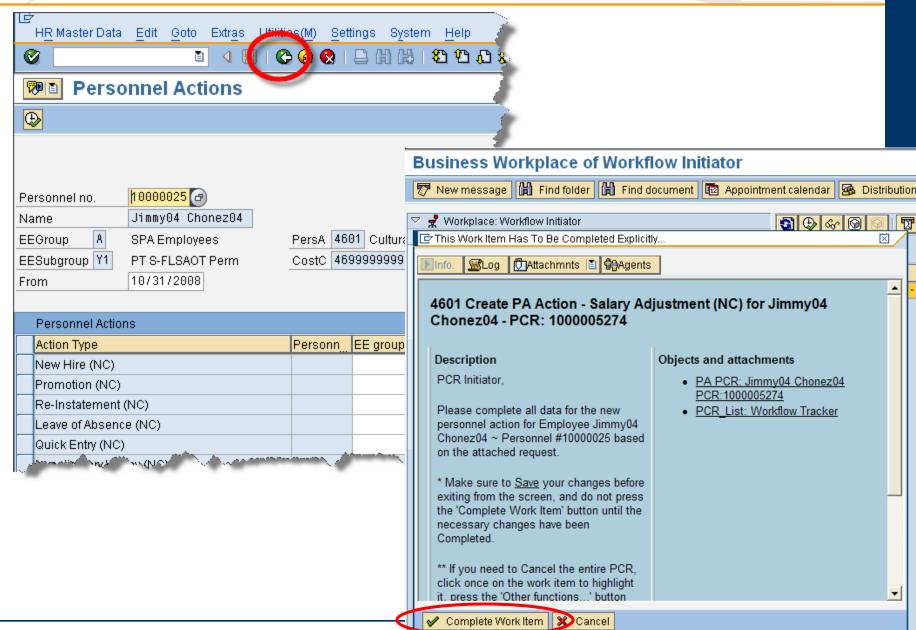






# FT to PT (or vice versa) Explicitly Complete





# Temp/ Intermittent > Accepted Perm. Position



- If temporary or intermittent employee accepts permanent position, it is <u>still</u> an Action.
- If position number did not change:
  - Appointment Change
- If position number changed:
  - Transfer or Promotion
- All temporary and intermittent employees are Bi-weekly
- Therefore the Action causes a move from one payroll type to a different payroll type (except within DOT):
  - Create PCR Action in Workflow
  - When PCR is received in Inbox, do <u>not</u> execute (except DOT to DOT)
    - Contact BEST

# **Communicate to Agency**



- Always contact other Agency as soon as offer has been accepted
  - Make sure there are no gaps between employment with leaving Agency and receiving Agency
  - Be sure that all time was entered, released and approved

	November 2008									
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday				
						1				
2	3 Time Entry COB	4	5	6 8423 PY Corrections	7 0423 PY Corrections	8				
9	10 0423 PY Finalization Time Entry COB	11 Veteran's Day	12 Regs Posted to CMC8	13 CMCS Reqs Submitted	14 0423Pay Day 0424 Period End	15				
16	17 Time Entry COB	18 0111 PY Corrections	19 0424 PY Corrections 0111 PY Corrections	20 0424 PY Corrections 0111 PY Corrections	21 0424 PY Finalization 0111 PY Finalization	22				
30 0111 Period End	24 Reqs Posted to CMC8 Reqs Posted to CMC8 Time Entry COB	25 CMCS Reqs Submitted CMCS Reqs Submitted	26 0424 Pay Day 0111 Pay Day	27 Thanksgiving	28 Thanksgiving 0426 Period End	29				

## Before You Begin Temp/Interm. to FT Position

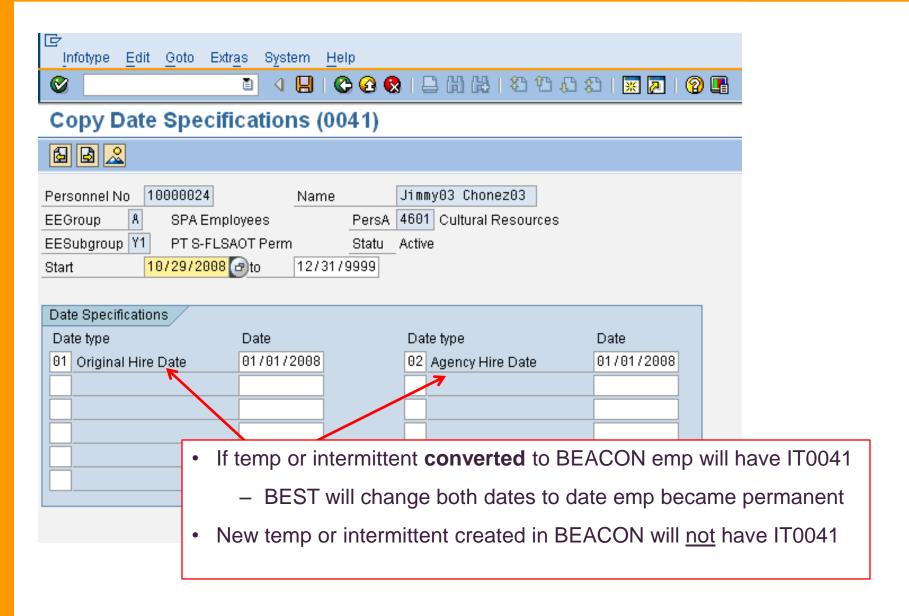


Scenario: A temporary or intermittent employee has accepted a full time position in your Agency.

- Refer to slide 3 regarding the Action type
- Do <u>not</u> separate the temporary or intermittent employee
- Before initiating WF use PA 20 to:
  - View employee and Action
  - Make sure employee does not have separation
  - See if active IT0027 (Cost Distribution) exists
    - It one exists, it must be delimited (do <u>not</u> delete) effective the day prior to new Action
- If employee's last Action is separation:
  - Contact BEST

## **About IT0041 for Temps and Intermittents**

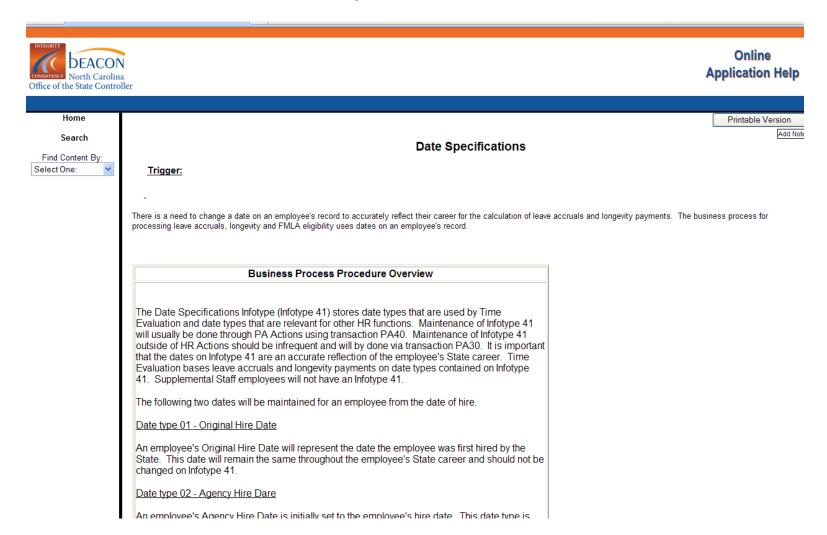




#### IT0041 is Maintained by PA



Job Aid at Beacon University



# IT0041 Date Types – All Perms Have These Two



All permanent employees have these two dates on IT0041 Date Specifications:

- Date type 01 Original Hire Date
  - Date employee was first hired by the State remains the same throughout the employee's State career and should not be changed
- Date type 02 Agency Hire Date
  - Initially set to the employee's hire date automatically changes based on an employee's reinstatement from leave, separation or transfer from one State agency to another State agency.

#### **Judicial or NCEL Additional Dates**



Employees hired at **Judicial** or **NCEL** have the following date types to track agency specific service on IT0041 Date Specifications:

- Date type 07 Lottery Anniversary Date
  - Date an employee is hired into or transfers to NCEL used to accrue an employee's personal leave day each year and to manage agency specific service.
- Date type 04 Judicial Anniversary Date
  - Date an employee is hired into or transfers to Judicial used to manage agency specific service.

## **IT0041 Date Specification Date Types**



The following date types will be created and maintained as necessary:

- Date type 03 Last Day Worked Date
  - The employee's final day of work prior to a separation from the State.
- Date type NR 457 Catch-Up Date
  - Date at which the employee will turn 65 and is thus eligible for additional contributions into the 457 Savings Plan. Day type NR will only be created if an employee is eligible and requests to make additional 457 contributions.
- Date type 06 Notification of RIF
  - Date an employee is officially notified his/her current position will no longer be available. This date also represents the beginning of the 12 month period of RIF eligibility and benefits.

# Reinstate FT Emp from LOA to PT Temporarily



Scenario: A full time employee is returning from a leave of absence. Due to the nature of the employee's illness (surgery, accident, etc.) the employee will not be able to return to full time work right away. Therefore the Agency and HR have made a decision that the employee will be able to return to work on a part-time basis for a short period of time, and then will return to full time work.

The key is that the employee is normally a full time employee and will eventually come back full time—their part-time status is temporary.

Note: This is <u>not</u> an employee returning part-time from Worker's Comp.

# Reinstate FT Emp from LOA to PT Temporarily

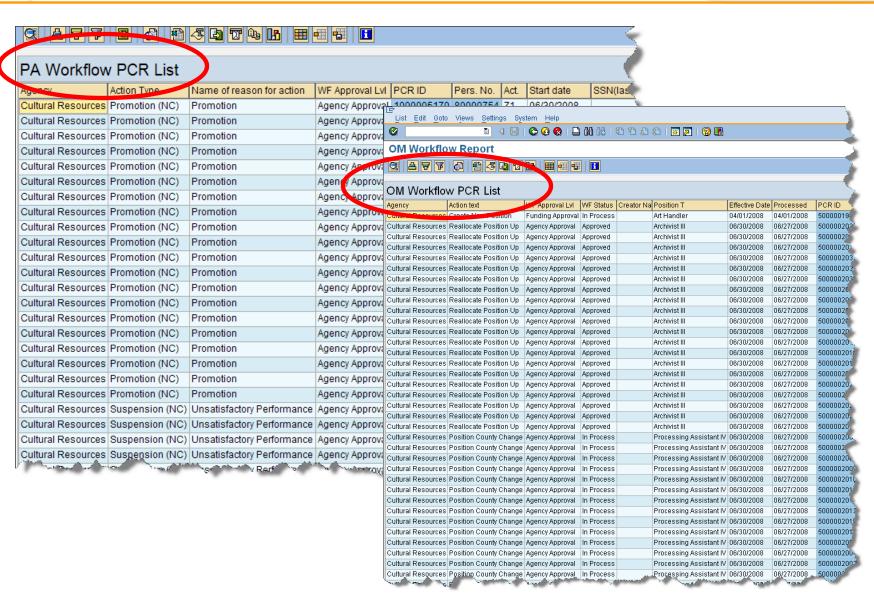


#### Scenario (see previous slide)

- Do <u>not</u> change (IT0008 Basic Pay)—use Reinstatement Action
  - Delimit IT2003 Substitutions
  - Full salary amount
    - a. If never coming back FT, in Reinstatement WF change employee subgroup and salary)
- Bring back as <u>full</u> time employee
- Adjust IT0007 Planned Working Time to their normal full time work schedule and positive time
  - If normally negative time, IT0019 Monitoring of Tasks reminder to put back to negative when goes back to FT
- If normally on a 40 hours week work schedule, manage time with 9400 for hours not worked

#### **Workflow Report**





#### **Workflow Report Overview**



- The WF report allows Approvers and Managers to see at a glance the:
  - type of Actions and reasons created in the Agency
  - Actions that are awaiting approval and at which approval level
  - length of time an approval has been waiting
- Transaction codes:
  - ZPA0189 (PA reports)
  - ZOM0178 (OM reports)
- Reports can be run based on security by:
  - Agency
  - Groups
  - Individual PCR
- Access the Workflow Report Job Aid online at:
  - http://help.mybeacon.nc.gov/beaconhelp/TOC7.html

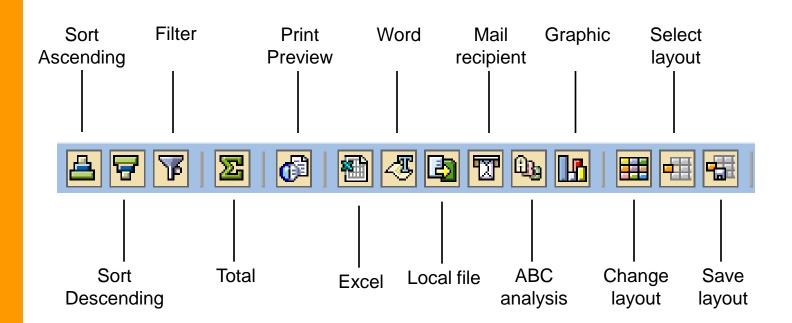
## **Searching for PCRs**



- PA
  - Personnel number
  - Action type
  - Personnel area
  - PCR ID
  - PCR WF Approval Level
- OM
  - Position ID
  - Action
  - Personnel area
  - PCR IDPCR WF Approval level

# **Report Options**

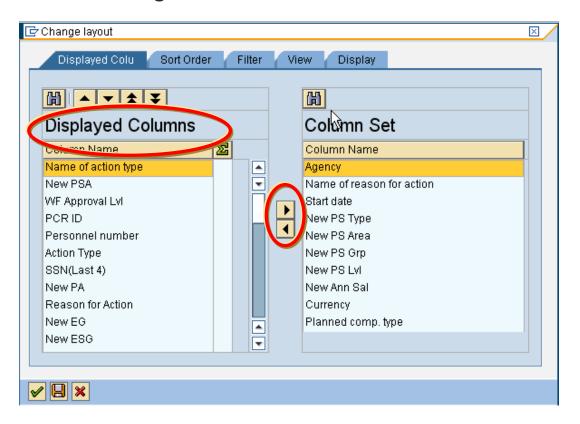




#### **Modify Layout**



 Use the Change Layout option to remove fields that you don't want to display from left to right



Drag and drop columns on the report to change the order

#### **Save Layout**



- Save layout field
  - Short name (begin with Z for user-specific)
- Name
  - Longer description for the layout
- User-specific
  - Only you have access
- Default setting
  - Indicates you want the layout to display each time the report is run

#### **Use a Layout**



- Complete search criteria fields for the report
- Click the Select layout option

or

- From the menu: Settings > Layout > Choose
- Select the applicable layout option
- Execute the report